Putting in Patron Information

1. Have the patron fill out a form. The form can be used to enter the information in Horizon. You should ask for:
   - Name, including middle initial
   - Date of birth
   - Guardian if under 16 (or whatever age your library considers appropriate)
   - Phone numbers, home, business, cell or other
   - Mailing address, permanent (and temporary address, for summer residents)
   - Email address
   - Contact person if this is someone in a school group or institutional setting
2. When entering the data in Horizon, always check to see if a patron was already put in by another library. Check the name, date of birth, address and phone to see if it is the same person. If they have been added, don't add them again. If the patron has a card at another library, you can invite local residents to switch their card to your library, or they can keep their existing card.
3. Don't edit another library's patron record except to correct address information with documentation. Instead, communicate with the other library if the patron is switching over to your library and ask them to delete their patron once all fines and checkouts are cleared.
4. Some libraries keep the paper form on file, and some don't. You can feel secure that the data you put into Horizon will be safe because we back it up and store it off-site.

5. We recommend the following fields for every patron. Those with a * are mandatory to be able to save the patron record.

   1. *Location – **AUS (or the library's 3-letter code)**
   2. Pin # - last 4 digits of phone number
   3. *Btype – **auad** (adult), **aujv** (juvenile), **ausen** (senior), **auya** (young adult), **auil** (ILL patron), **audelb** (delinquent), **aulocal** (local only) **(or one of the libraries assigned btypes)**
   4. *Name – in the format "Last, First"
   5. Phone and Phone Type – in the form xxx-xxxx , common phone types are h, b, cell
   6. Barcode – scan from the card
   7. Stat Class – every patron should have either **a_nres** or **a_resid** to indicate if they are residents of your service area for Ann. Rept.
   8. Address – **Line 1**, **City/State code** and **Postal Code**
   9. Email (Second Blank: Addr.)
   10. Birthdate – in the form mm/dd/yyyy